Chapter 2   Organizational Management

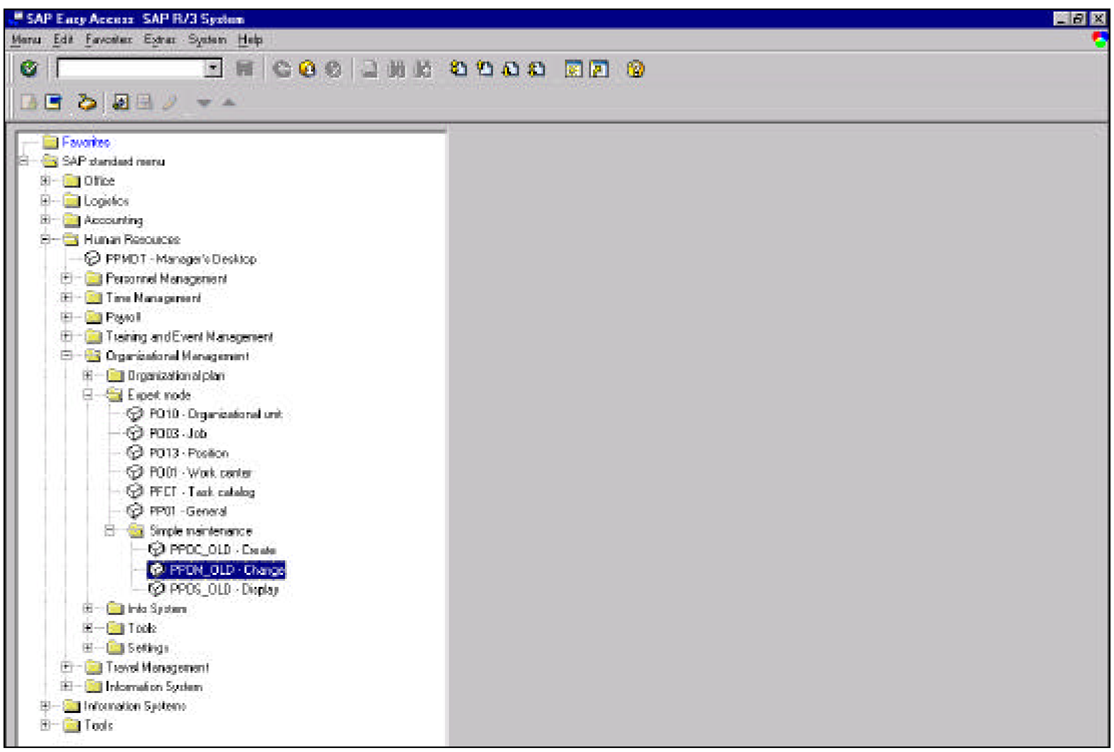
Background Information and Creation of an Organizational Unit

An organizational unit represents a user-defined organizational unit whose job it is to take on and carry out certain functions within a company. Departments and Project groups are both examples of organizational units. The root organizational unit is Navy MWR and this cannot be changed. All other organizational units are created under this root unit using the change mode. In other words, the child organizational units inherit the structure of the units directly above them. **Organizational units will only be maintained and created by Headquarters.**

Use the following menu path or transaction code to access this procedure.

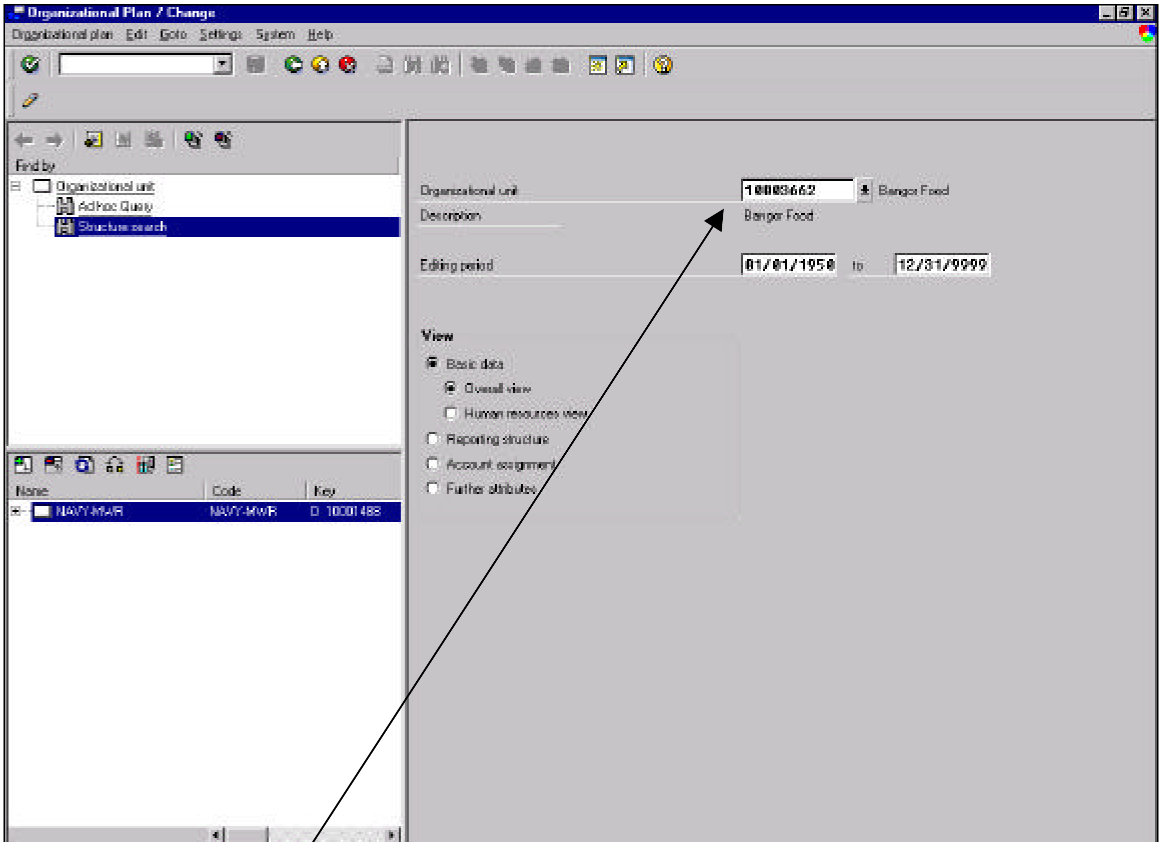
Menu Path: **HUMAN RESOURCES > ORGANIZATIONAL MANAGEMENT > EXPERT MODE > SIMPLE MAINTENANCE > CHANGE**

Transaction Code: **PPOM_OLD**



The opening screen appears as shown below:

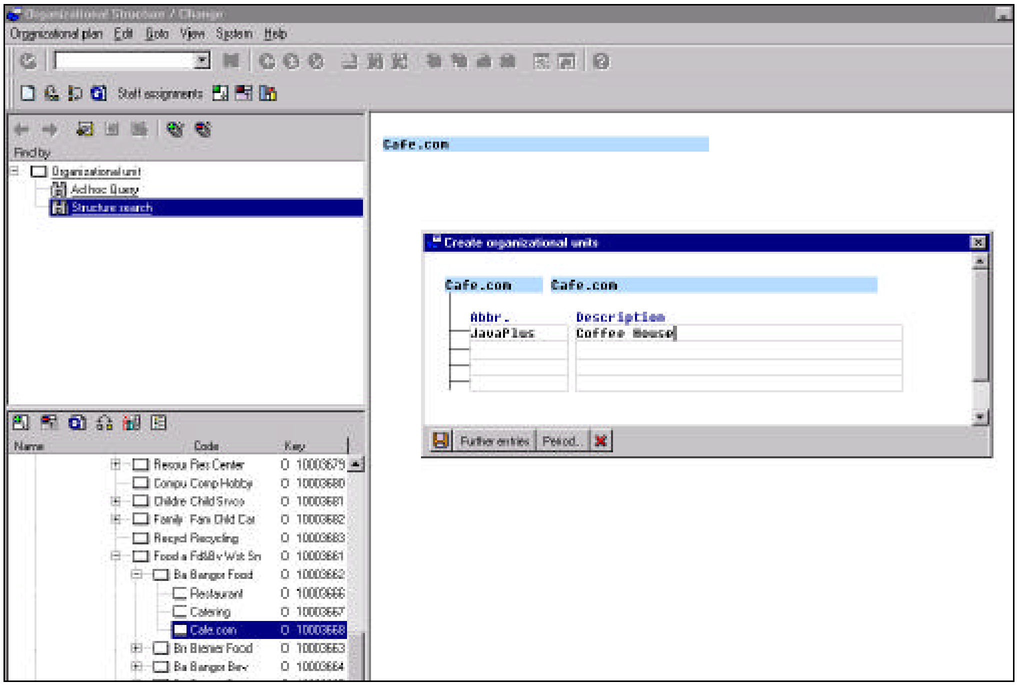
Organizational Plan / Change



Field Name	R/O/C	User Action & Values
Organizational Unit	R	Populated by using the dropdown arrow in the lower left quadrant to find the Org unit the new one will be created in.
Editing Period	R	Always enter 01/01/1950. Leave the "to date" as 12/31/9999.

Click the Change Icon (Pencil) or double click on the Org Unit on the left hand side of the screen.

The result is shown on the page below, The Organizational Structure /Change Screen appears and it will allow you to create a new organizational unit.

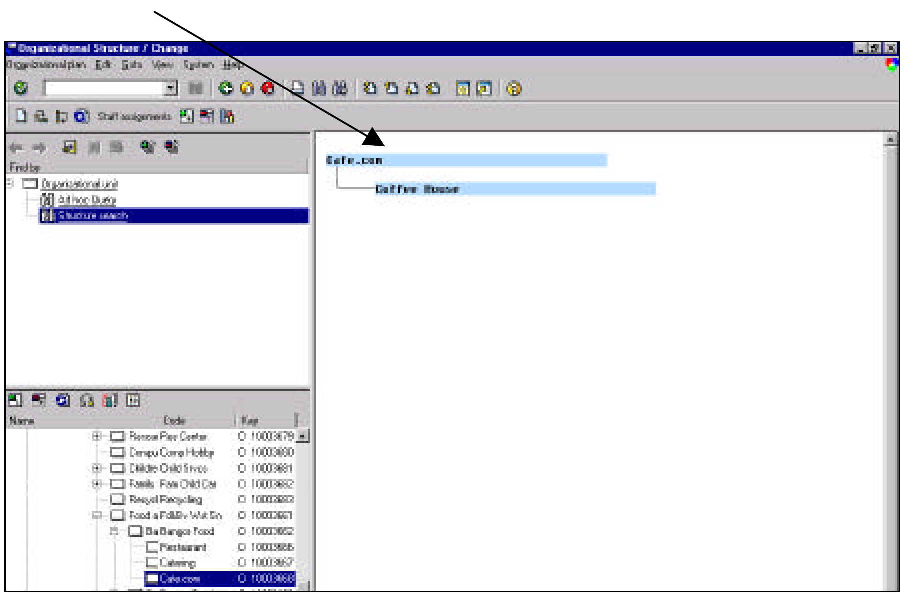


In the example shown above, we double clicked on the Café.com icon in the left quadrant which is an org structure unit already set up in the Bangor – Food organization. Click on Create icon.

We now enter the abbreviation "JavaPlus" which is a required field and also the required description "Coffee House".

We select the Save icon .

The Organizational Unit is created and can be seen in the structure.



Assign a Personnel Area and SubArea to an Organizational Unit

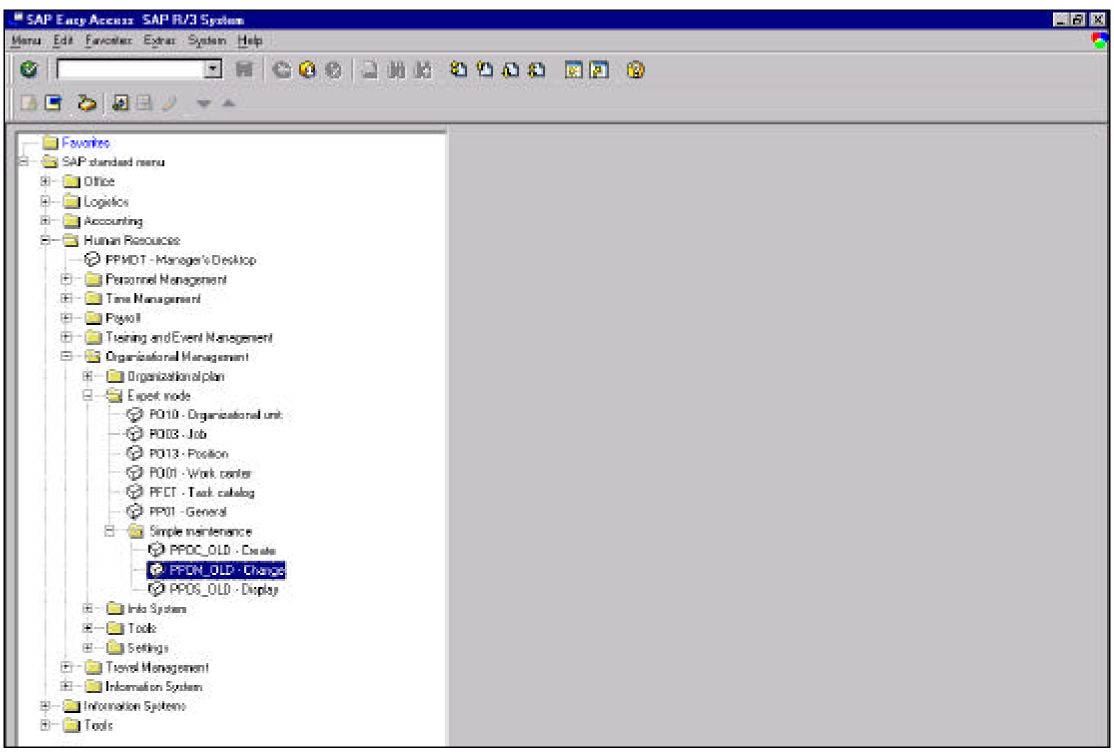
The next step in our processes of setting up a viable organizational unit and leading to the actual procedures to hire employees is to assign Personnel area and subareas to the organizational unit that has been set up. **This is to be done at Headquarters Level**.

This procedure is accessed through the same menu path and transaction code as the previous procedure.

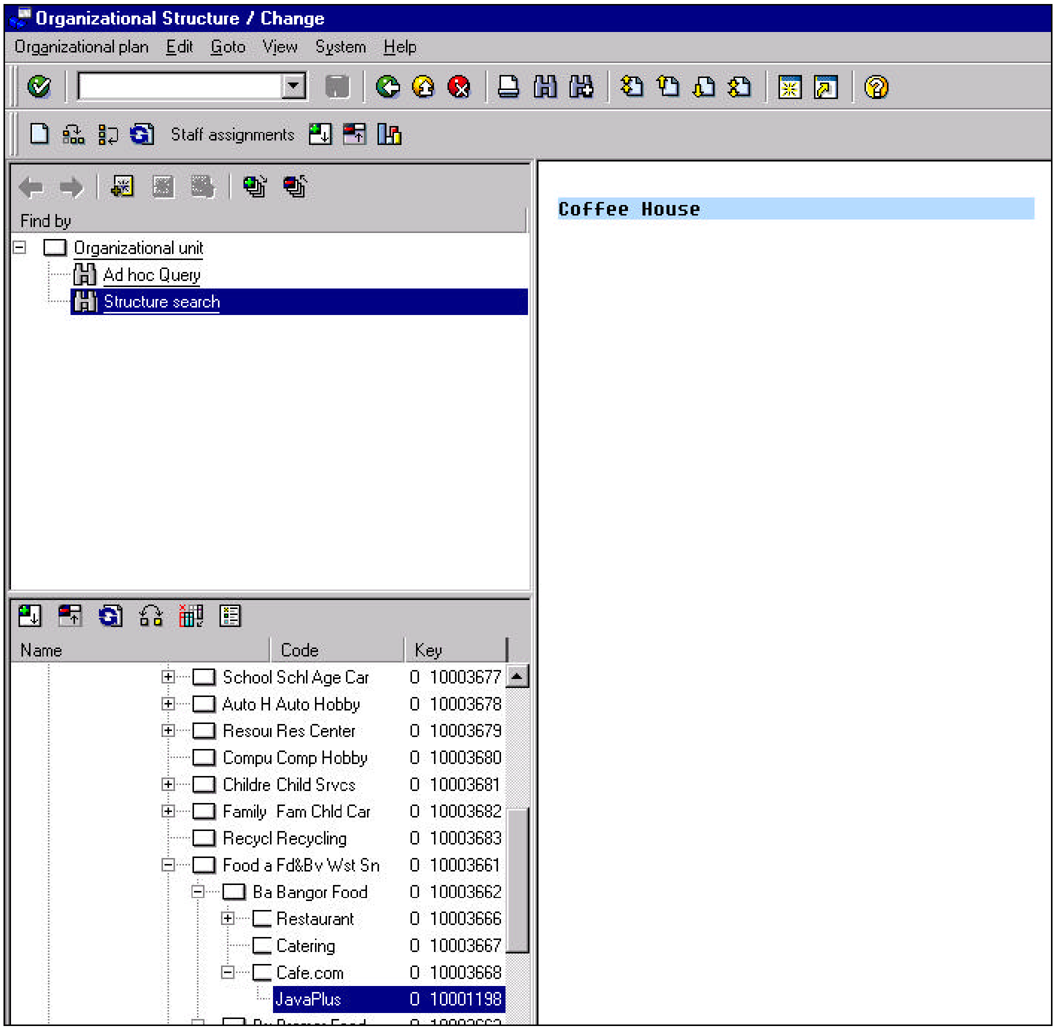
Menu Path: **HUMAN RESOURCES** > **ORGANIZATIONAL MANAGEMENT** > **EXPERT MODE** > **SIMPLE MAINTENANCE** > **CHANGE**

Transaction Code: **PPOM_OLD**

NOTE: This is the same transaction code as the first procedure. Transaction codes in the Human Resources module act a little differently than t-codes in the FICO world. A transaction code within HR usually goes to an opening screen which may be the same for many procedures. It might not be unique to the procedure that you are presently working on.)

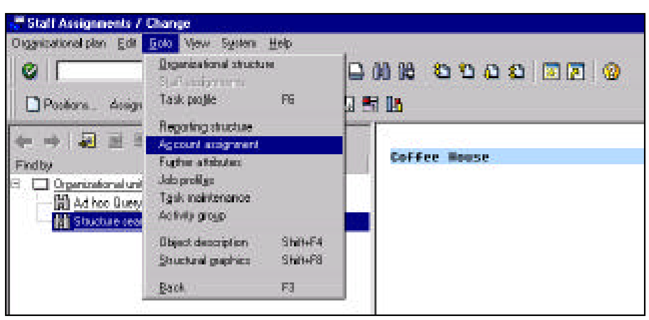


Organizational Structure / Change

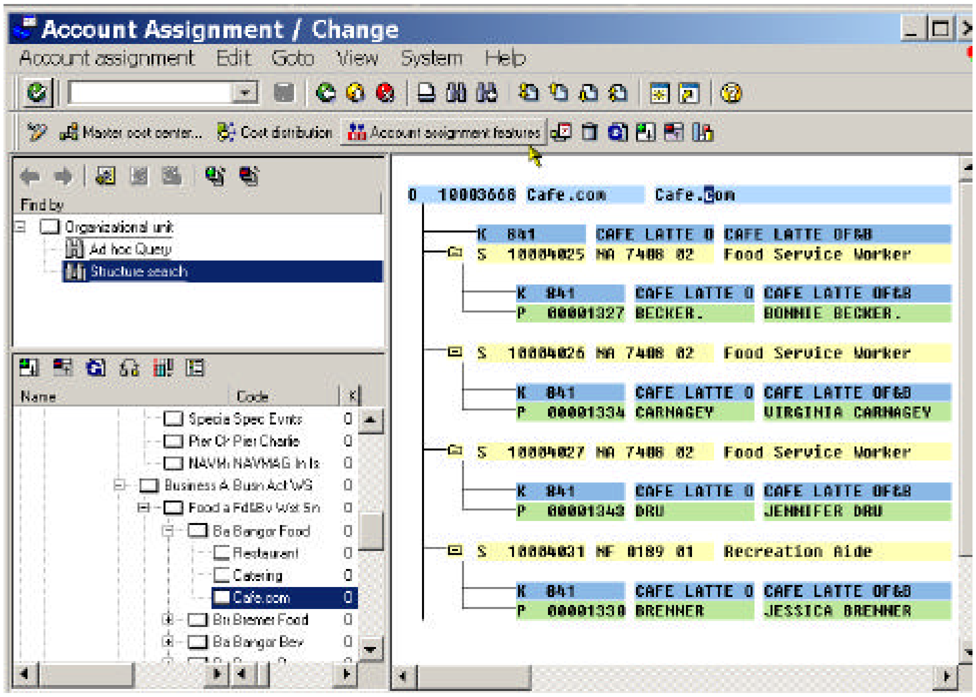


We have highlighted the organizational unit and double clicked the name in the lower left window that we had created in the previous procedure – JavaPlus – Coffee House, and it appears in the right hand window.

With the org unit highlighted in the right side window, use the menu path **GoTo** > **Account assignment**.



On the “Account Assignment/Change” screen, highlight the organizational unit. Once organizational unit is highlighted, click “Account assignment features” as shown below..



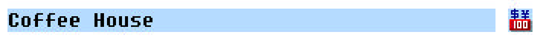
Enter information in this screen as described in the table on the next page.

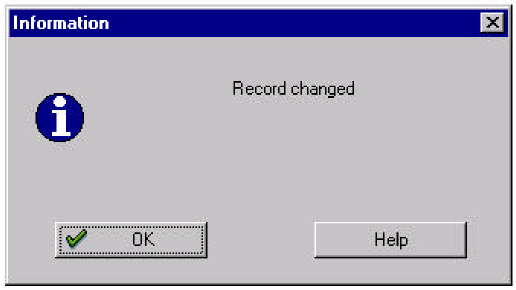
Create Account Assignment Features

Field Name	R/O/C	User Action and Values
Validity	R	Enter the valid dates if they don't default. Should be 01/01/1950 to 12/31/9999
Company Code	N/A	This will default later **Leave Blank**
Business Area	N/A	**Leave Blank**
Personnel Area	R	Enter valid information for the organizational unit by using the drop down search help. Example: the Northwest Region number 1287
Personnel SubArea	R	Enter valid information for the organizational unit by using the drop down search help. Example: the West Sound of the Northwest Region number 1287
CO Area	N/A	**Leave Blank**

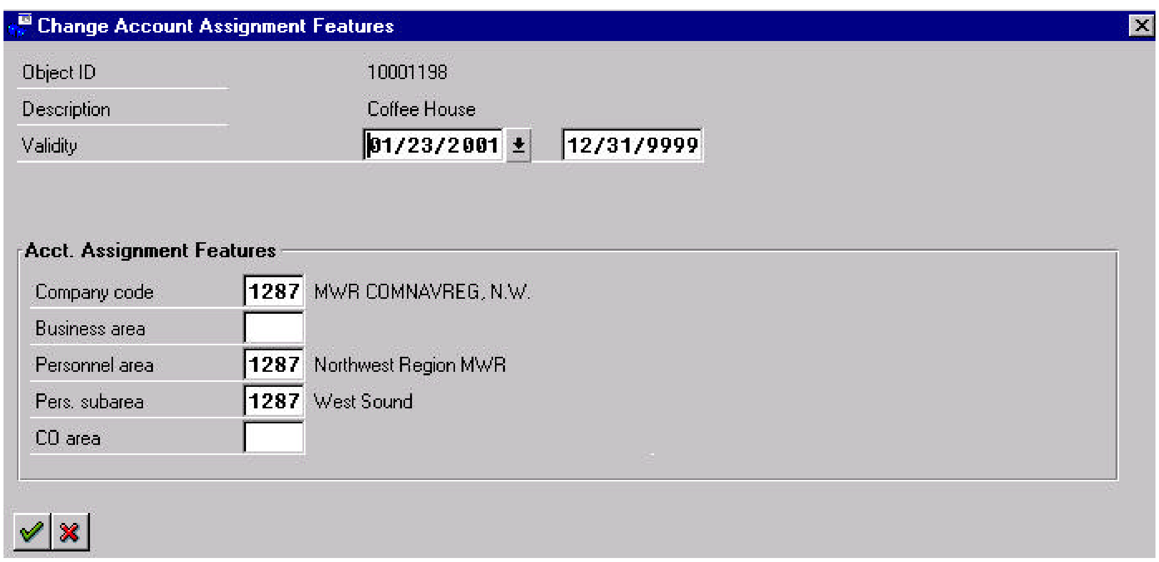
Once the information is entered, press Enter or click the green check mark.

You will notice from the screen below that the message window shows that the record has been changed and there is a small Dollar icon on the line designating the org unit.





Single click on the dollar icon to validate your entries. Once your entries have been validated as shown on the window below, use the green back arrow key to exit the screen.



Note that the Company code is now part of the screen window and the Personnel Area and subarea have been named.

Create a Job

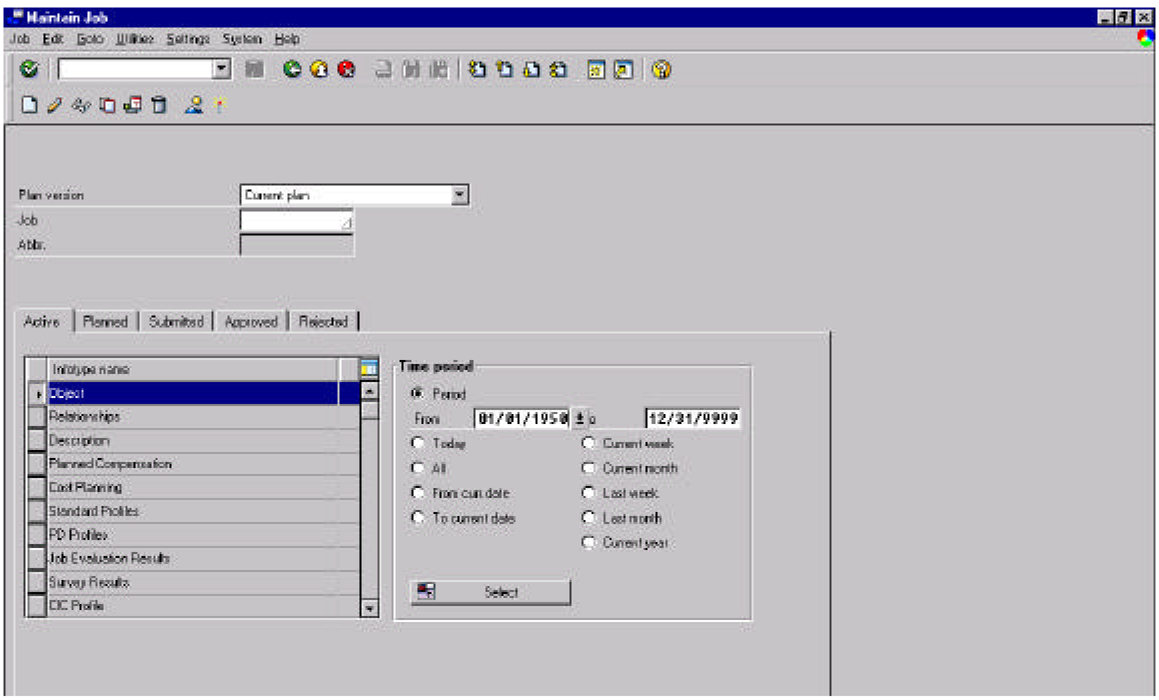
This is another Headquarter function to create a new job with Pay plan, series, grades, etc.

Use the following menu path or transaction code to access this procedure.

Menu Path: **HUMAN RESOURCES > ORGANIZATIONAL MANAGEMENT > EXPERT MODE > JOB**

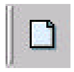
Transaction Code: **PO03**

Screen: Maintain Job

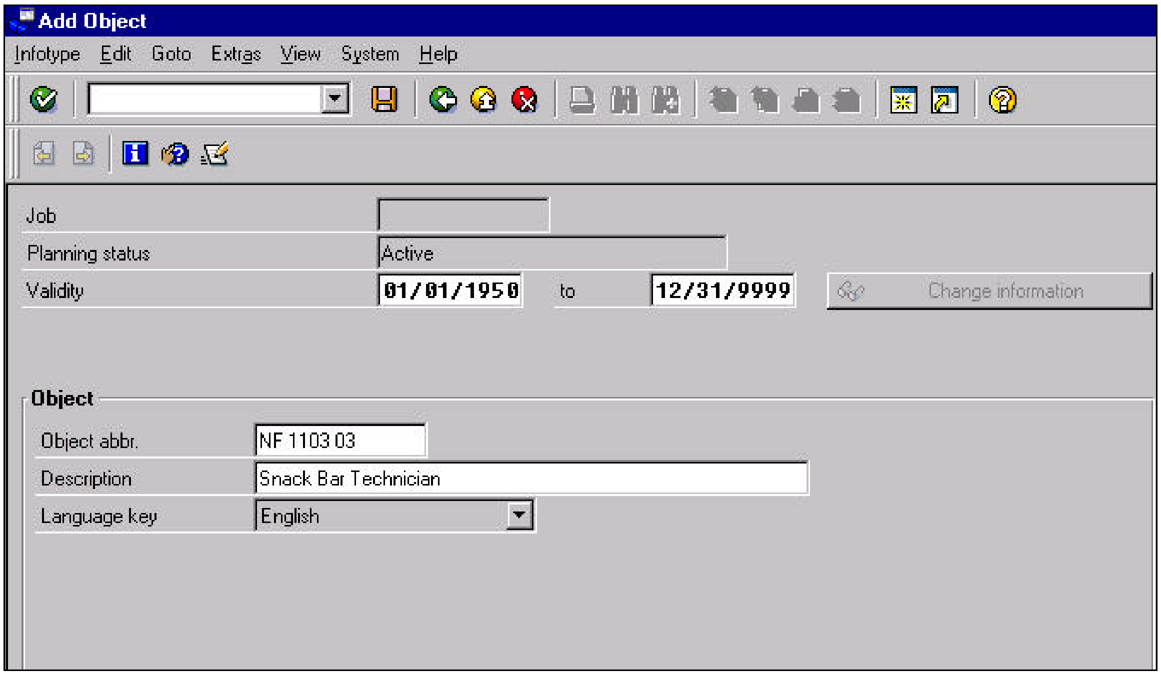


Field Name	R/O/C	User Action/Values
Plan Version	R	Will default to "Current plan" **DO NOT CHANGE**
Job	R	Leave this field blank and if there is an entry in it, Blank it out! SAP will assign a number after the job is created.
From Date	R	Enter beginning date of new job creation
To Date	R	Defaults to 12/31/9999 Leave it as is.

Highlight the Object line in the Infotype Name section by clicking the small box to the left of the text.

Click the Create icon  located on the left end of the toolbar.

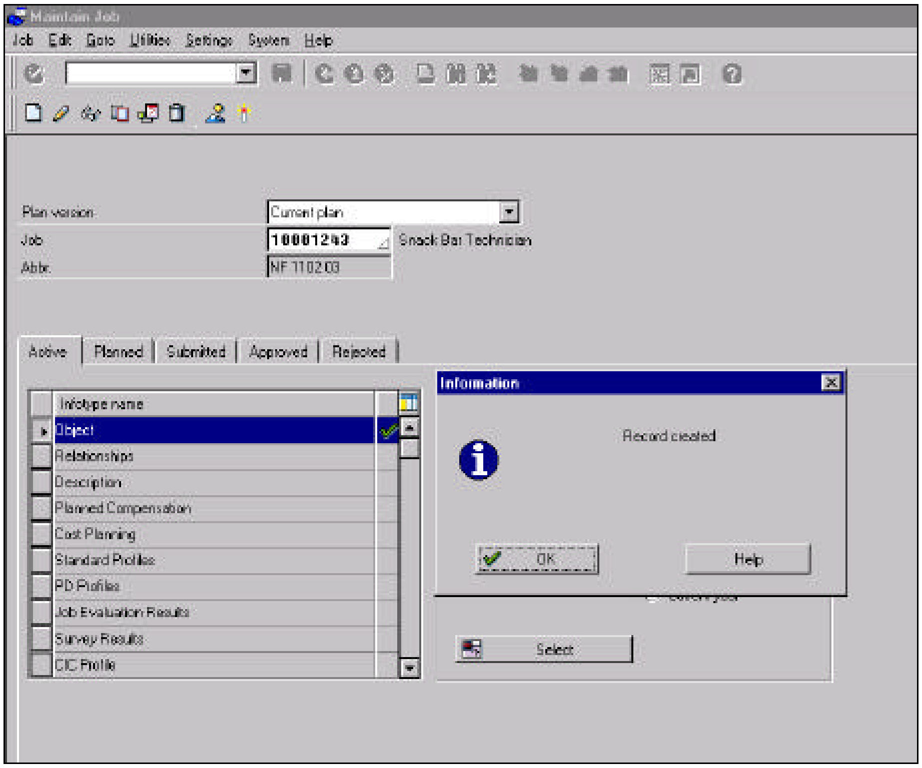
Screen: Add Object



Field Name	Description	R/O/C	User Action/Values
Validity Date	Date of the Job	R	Verify the dates to be 01/01/1950 to 12/31/9999
Object abbr.	Should be in the form NF 1102 02	R	Enter the complete Pay plan, Series, and Grade
Description	Long Text	R	Complete Title
Language Key	Language	R	Defaults to English and cannot be changed.

Enter or click on the green check mark and the Save icon .

Once the infotype is saved, the following screen will show the system-generated Job number as shown below.



Create a Position

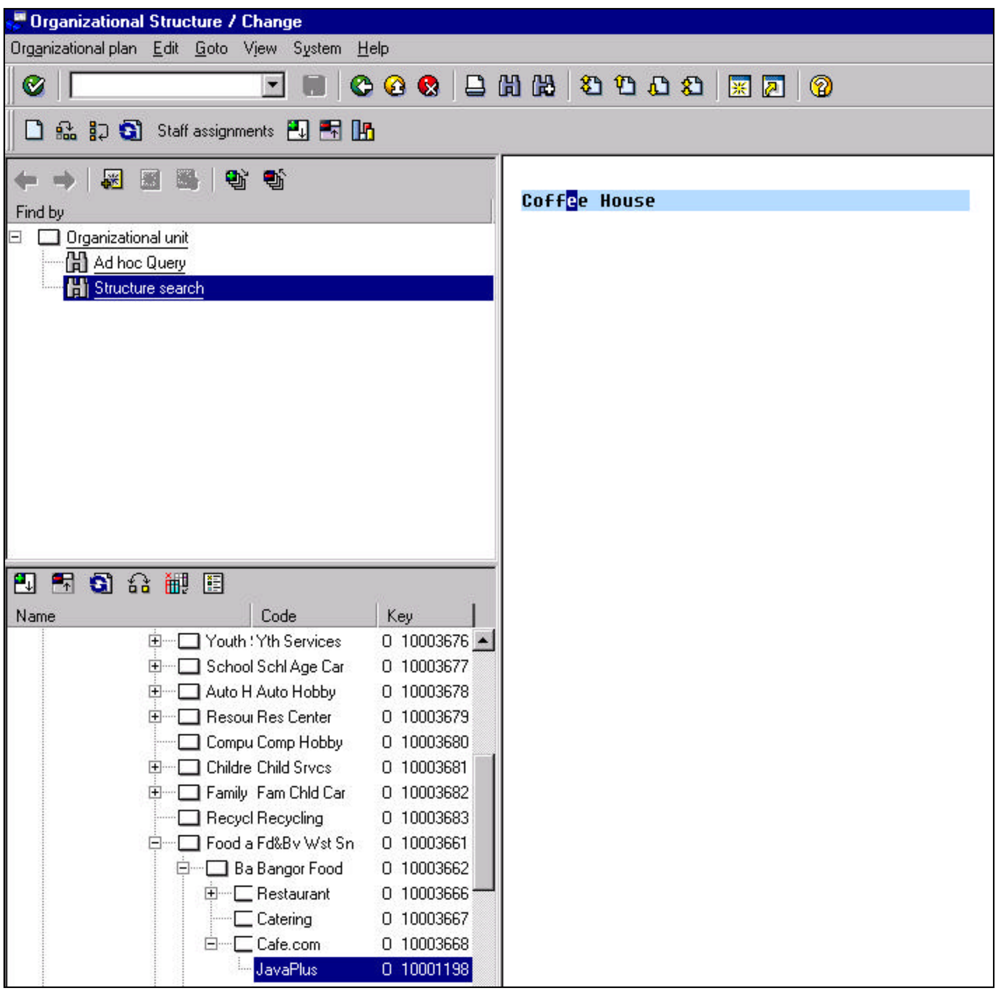
This will be a field level function. When a new position is needed at the field level, SAP will require a position number. A position CANNOT be set up without a job number and description already in the system. If there is no existing job that pertains to the new requested position, Headquarters must create a new job.

This transaction may be accessed using:

Menu Path: **HUMAN RESOURCES > ORGANIZATIONAL MANAGEMENT > EXPERT MODE > SIMPLE MAINTENANCE > CHANGE**

Transaction Code: **PPOM_OLD**

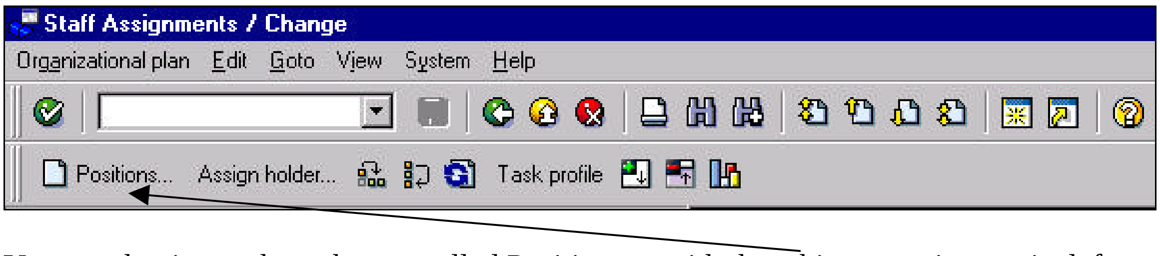
Screen: Organizational Structure / Change



We have drilled down to the org unit for which we need the new requested position. In our example, we highlighted the JavaPlus in the lower left window that we set up in the first process of this chapter. We then double clicked on the org unit name, JavaPlus.

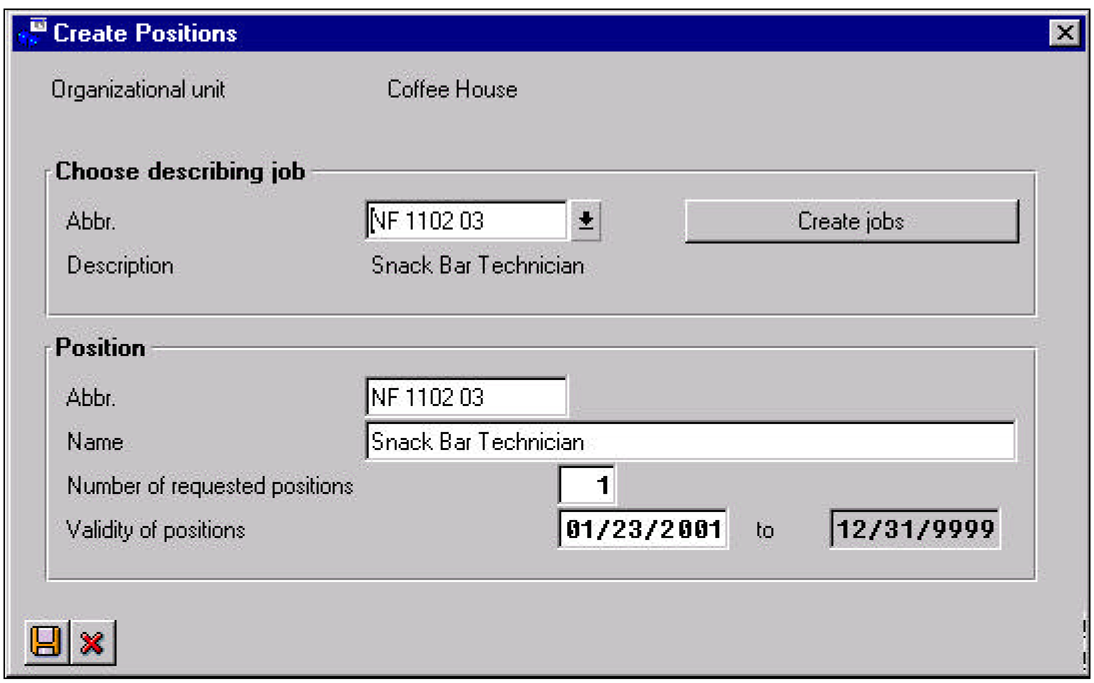
We then highlighted the Coffee House designator in the right window and clicked on the Staff assignments icon on the toolbar.

The toolbar will change and now has the following appearance.



You see that it now has a button called Positions… with the white paper icon to its left.

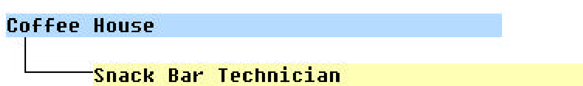
Click this icon and the Create Positions window shows.

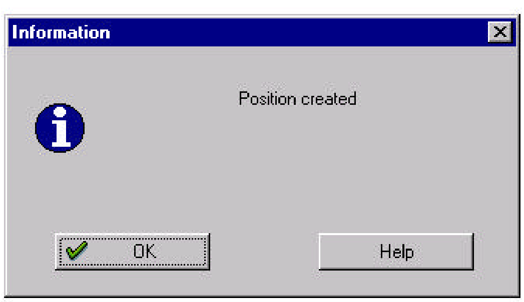


Field Name	Description	R/O/C	User Action and Values
Abbr	The job abbreviation	R	Enter the job abbreviation or use the dropdown arrow to select. This is the pay plan, series, and grade. Once the job is selected, press the Enter key on your keyboard
Description	Job Description Full Text	R	System enters based on the Abbr entered. It is grayed out and cannot be changed.
Position Abbr.	The position abbreviation defaulted from the Job abbr.	R	System enters based on the job, do not change it.
Name	The Position Name	R	This will also default from the job entry. Only change it if different from the job name.
Number of positions requested	The number of this position required	R	Will default to “1”. Change if requesting a different number.
Validity of positions	The start date of the position	R	Make sure this entry coincides with the requested start date of the position.

Click the Save icon to create the positions .

Verify that the new position is created in the org structure.





At this point, follow instructions that follow to assign cost center to position.

Assign Cost Center to a Position

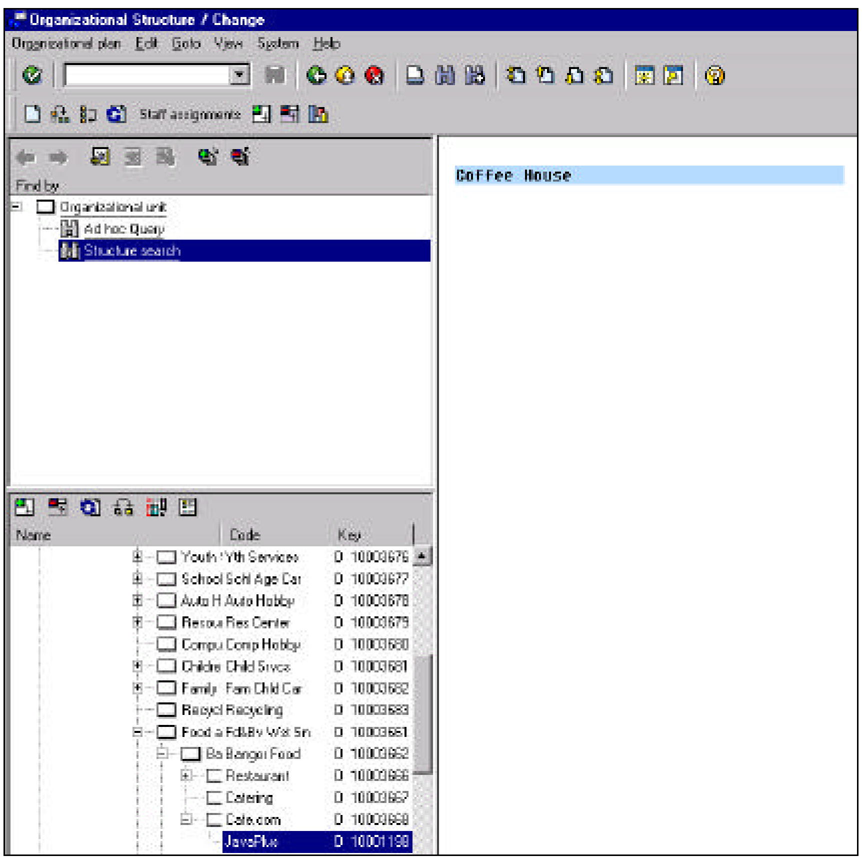
Do this procedure when a new position is created or the cost assignment of a position has changed. A new association must be created within Organizational Management that associates a cost center to a position.

This transaction may be accessed using:

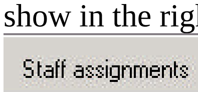
Menu Path: **HUMAN RESOURCES** > **ORGANIZATIONAL MANAGEMENT** > **EXPERT MODE** > **SIMPLE MAINTENANCE** > **CHANGE**

Transaction Code: **PPOM_OLD** (Again, this is the same transaction code that we have been using.)

Screen: Organizational Structure / Change

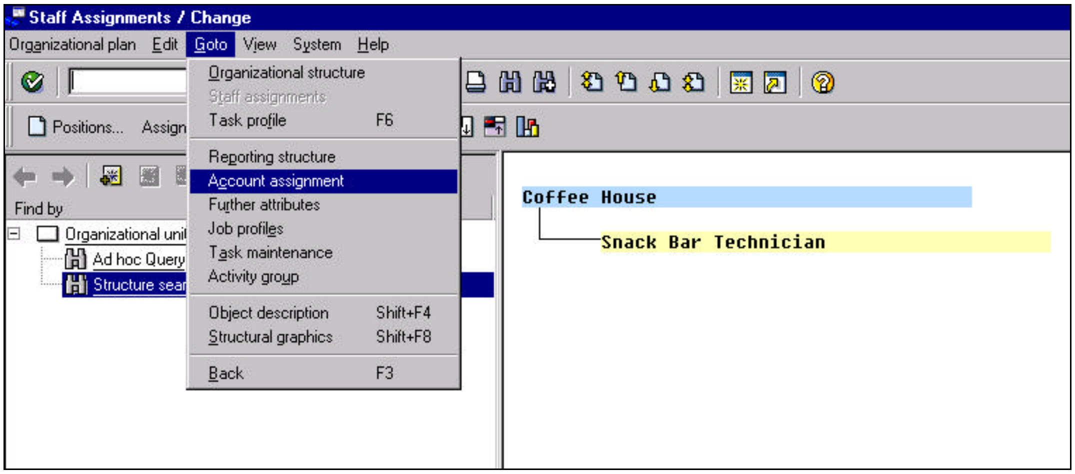


After double clicking the Org Unit name on the left quadrant, the desired org unit will show in the right hand window. Click on the new position title, then click the



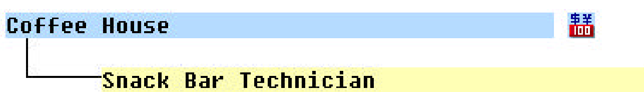
button on the toolbar.

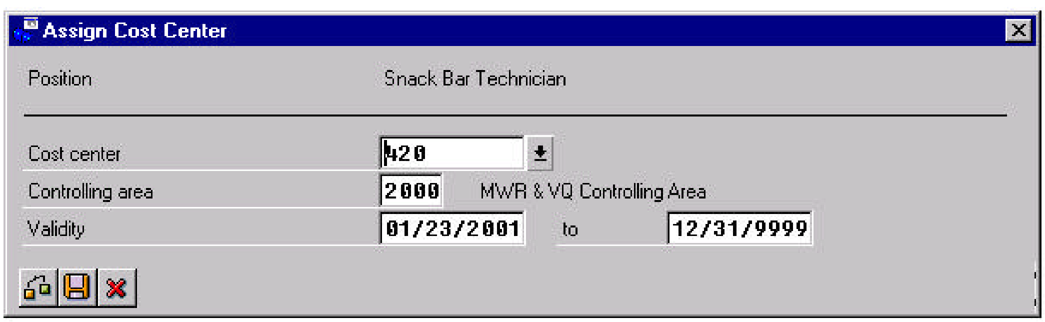
Use the top menu path GoTo > Account Assignment as shown below:



After clicking the menu item, the toolbar changes showing the following icon

. Highlight the position, then click on this Master cost center button to open the following screen.





Select the correct Cost Center using the green back arrow and click the Save icon.
The example chosen is for demonstration purposes only and it is not a true association.

The Controlling area field will default to 2000 – The MWR & VQ Controlling Area
DO NOT CHANGE.

Make sure the date is correct, the date that the cost center is assigned to the position, and has an end date of 12/31/9999. If a position is changing cost centers, creating a new record will delimit the old cost center and begin a new one.

Once the above information is entered correctly, click the Save icon .

The message line will verify your action and there will now be a plus sign beside the position that identifies that the relationship has been created.

Click on this plus sign to open and to verify the cost center attached to this position as shown here.

If the Cost Center is correct, use the green back arrow  to exit to the main menu.

Attach an Employee (EE) Group to a Position

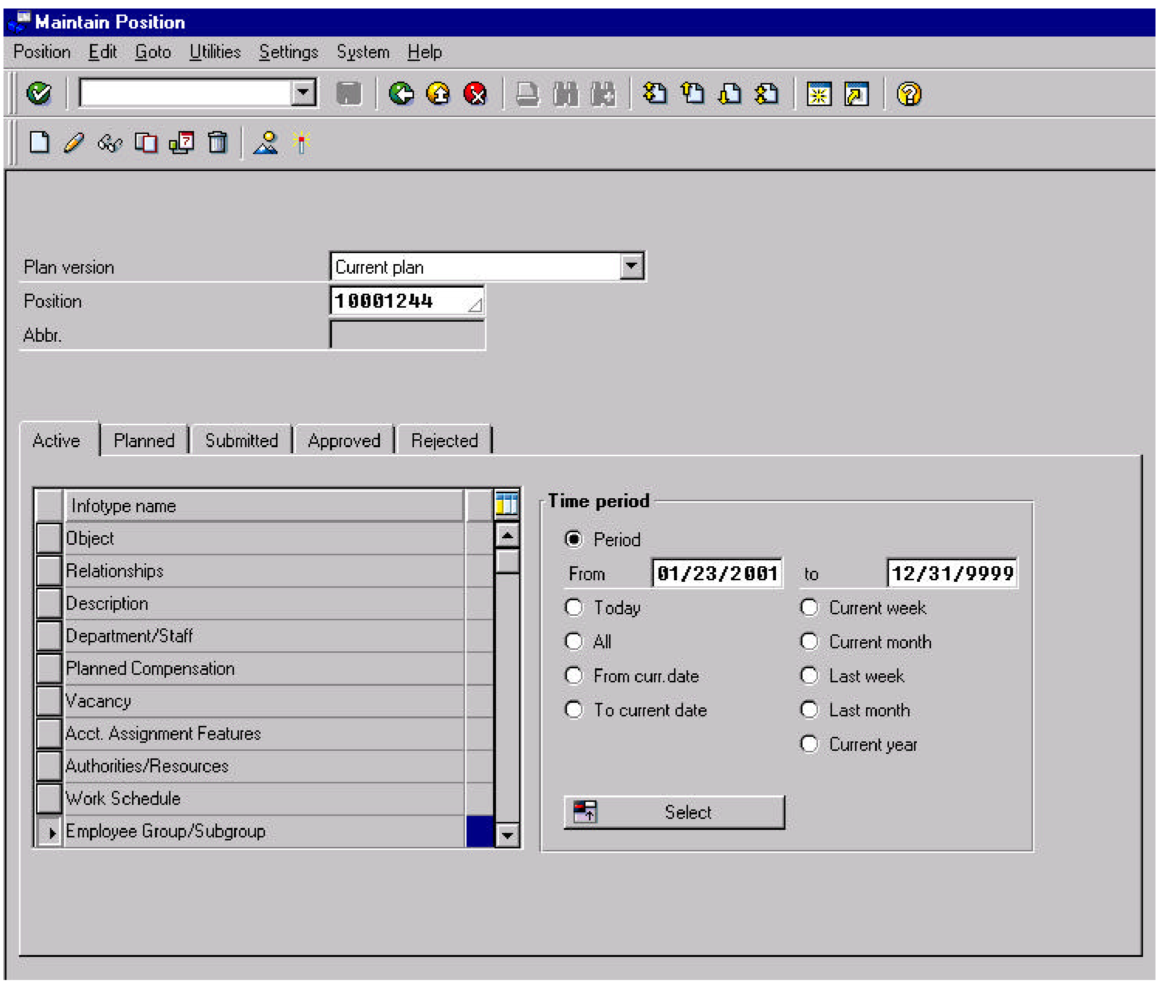
An employee is hired and the Employee (EE) group defaults to the action infotype 0000. At this point it is necessary to set up Infotype 1013 with the correct information. This procedure allows this to be done.

Use the following menu path or transaction code to access this transaction.

Menu Path: **HUMAN RESOURCES > ORGANIZATIONAL MANAGEMENT > EXPERT MODE > POSITION**

Transaction Code: PO13

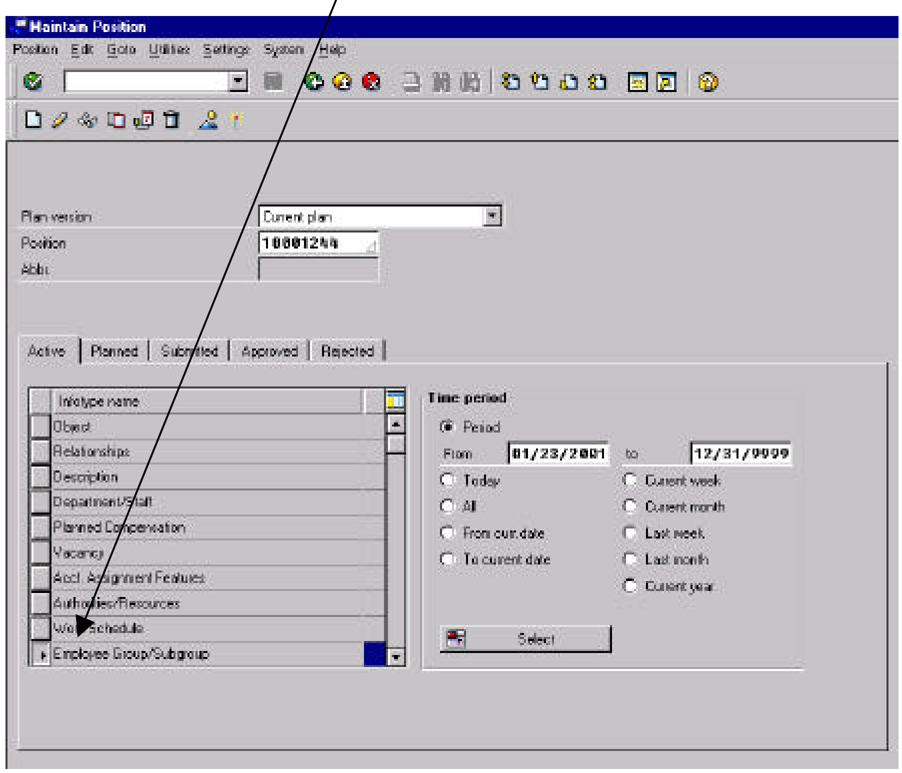
<u>Screen: Maintain Position</u>

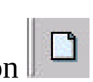


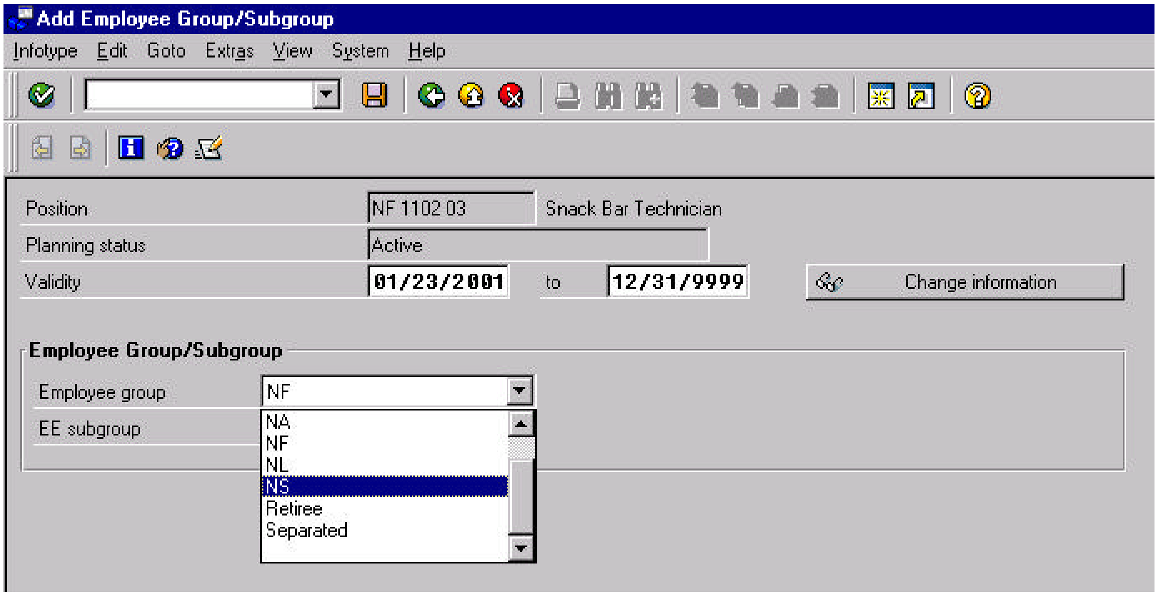
The table below shows the correct inputs.

Field Name	Description	R/O/C	User Action/Values
Plan Version	Should always default to the Current plan	R	No action required. It will default
Position	Enter the position number	R	Enter the position number if known or use the dropdown search help to select the correct position.
Abbr.	Will default based on the position selection.	R	No action required. It will default based on the position chosen.
From	Begin date of the relationship	R	User defined
To	End date of the relationship	R	User defined

Highlight the Employee Group/Subgroup line in the Infotype name box by clicking on the small box to the left of the text.



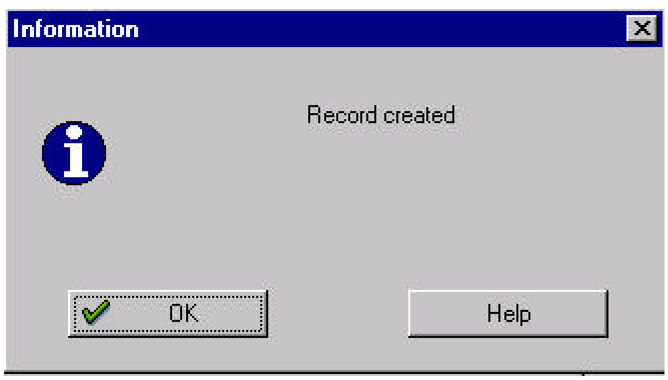
Once the line is highlighted as shown, click the Create icon  on the toolbar.



In the example shown, we are entering the Employee Group using the dropdown arrow to select the “NS” entry.

Do NOT enter any entry in the EE subgroup field.

Once the information has been entered, click the green check mark to verify your entries. If they are valid, click on the Save icon to create the relationships.



The Employee Group will now default for the selected position in the actions.

Reassign a Position to a Job

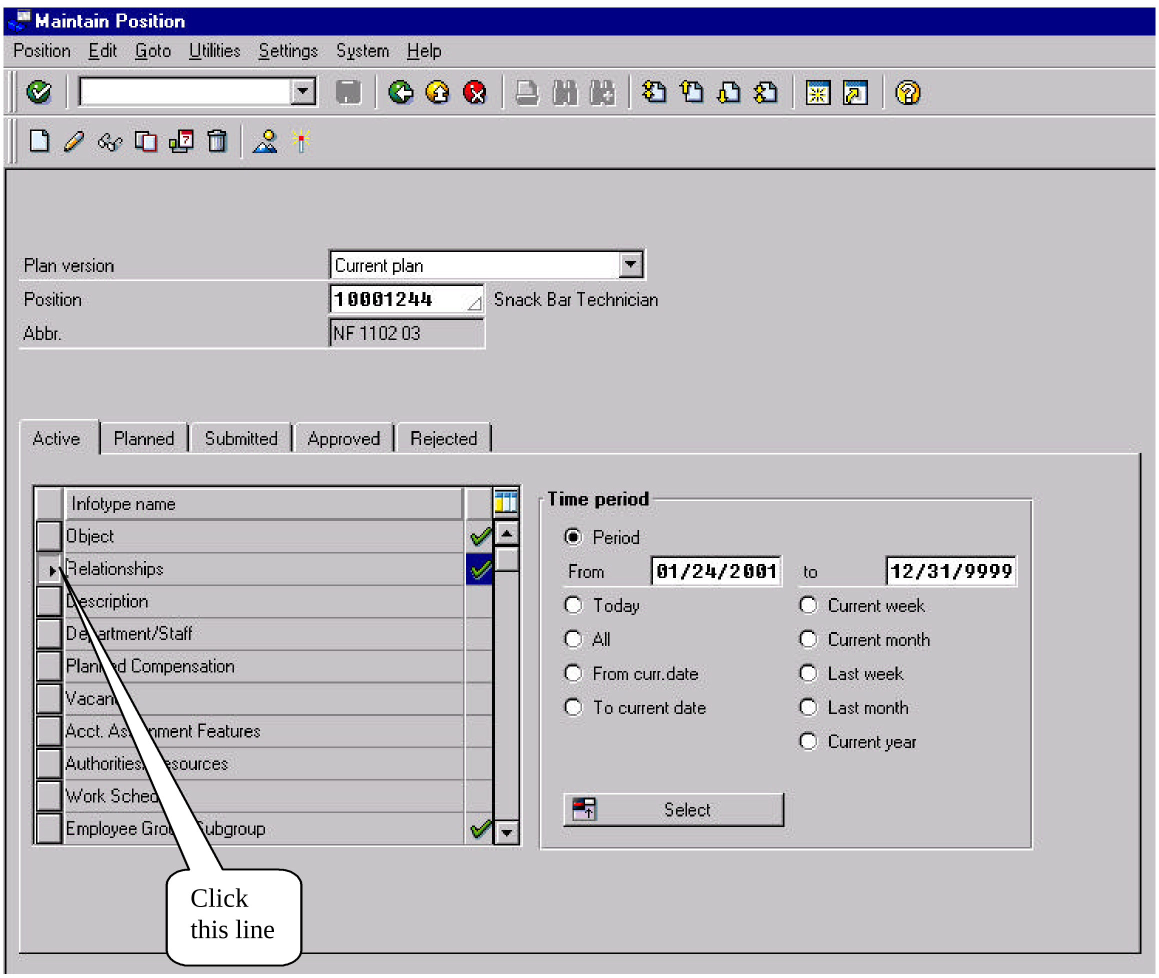
The position that an employee holds changes job series. For example, a position is related to job NF 1101 02 and is to be changed to NF 1101 01.

Use the following menu path or transaction code to access this transaction.

Menu Path: **HUMAN RESOURCES > ORGANIZATIONAL MANAGEMENT > EXPERT MODE > POSITION**

Transaction Code: **PO13**

<u>Screen: Maintain Position</u>



The following table explains the inputs to the opening screen.

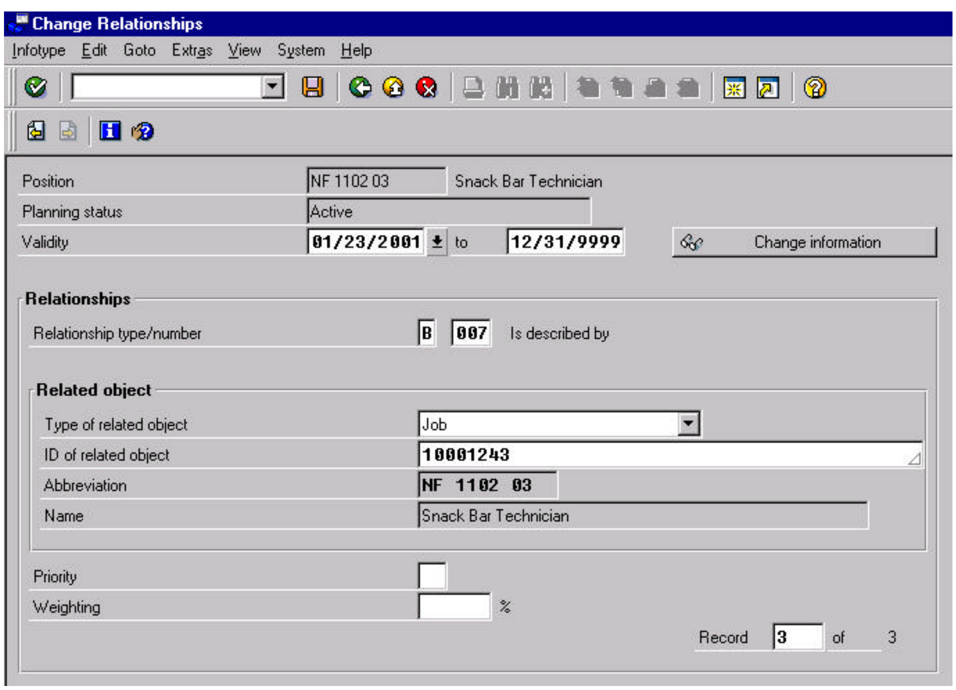
Field Name	Description	R/O/C	User Action/Values
Plan Version	Should always default to Current plan	R	No Action Required
Position	Enter the position number	R	Enter the position number if known or use the search help with the dropdown arrow.
Abbr.	Will default based on the position chosen	R	No Action Required. Will default once the user enters the system.
From	Begin date of the relationship	R	User Defined
To	End date of the relationship	R	User Defined

Press the Enter button on the keyboard or click the green arrow check mark .

Highlight the Relationships line in the Infotype name box by clicking on the small box to the left of the text as shown on the screen above.

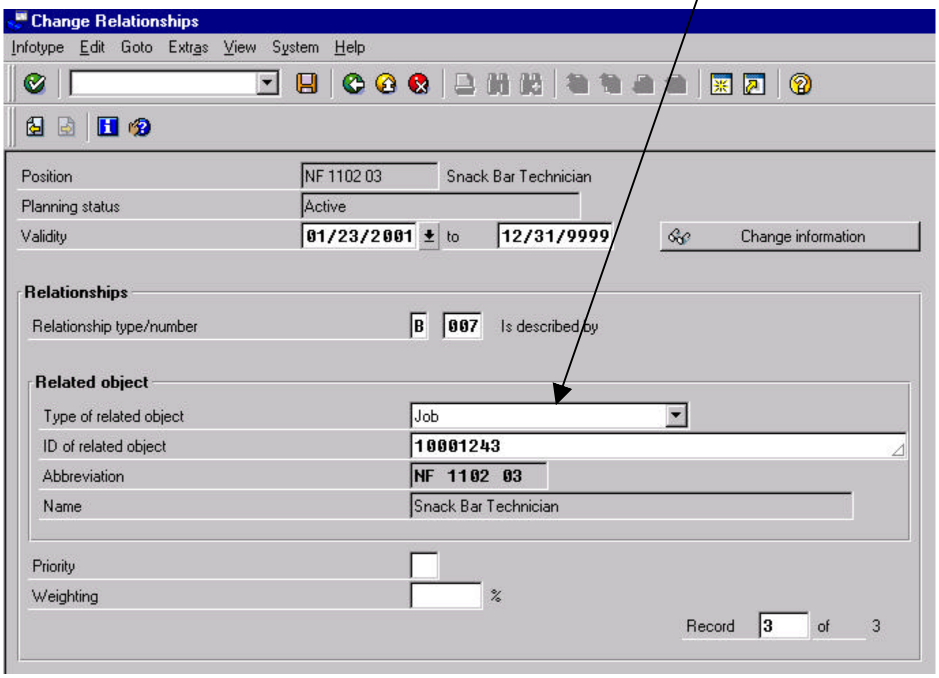
Once the Relationships line is highlighted, click on the pencil icon  on the toolbar. The next screen is the "Change Relationships" screen.

__Screen: Change Relationships__



Use the next record icon  to cycle through the records until you arrive at the infotype that houses the job relationship.

The correct infotype should have information similar to the following.

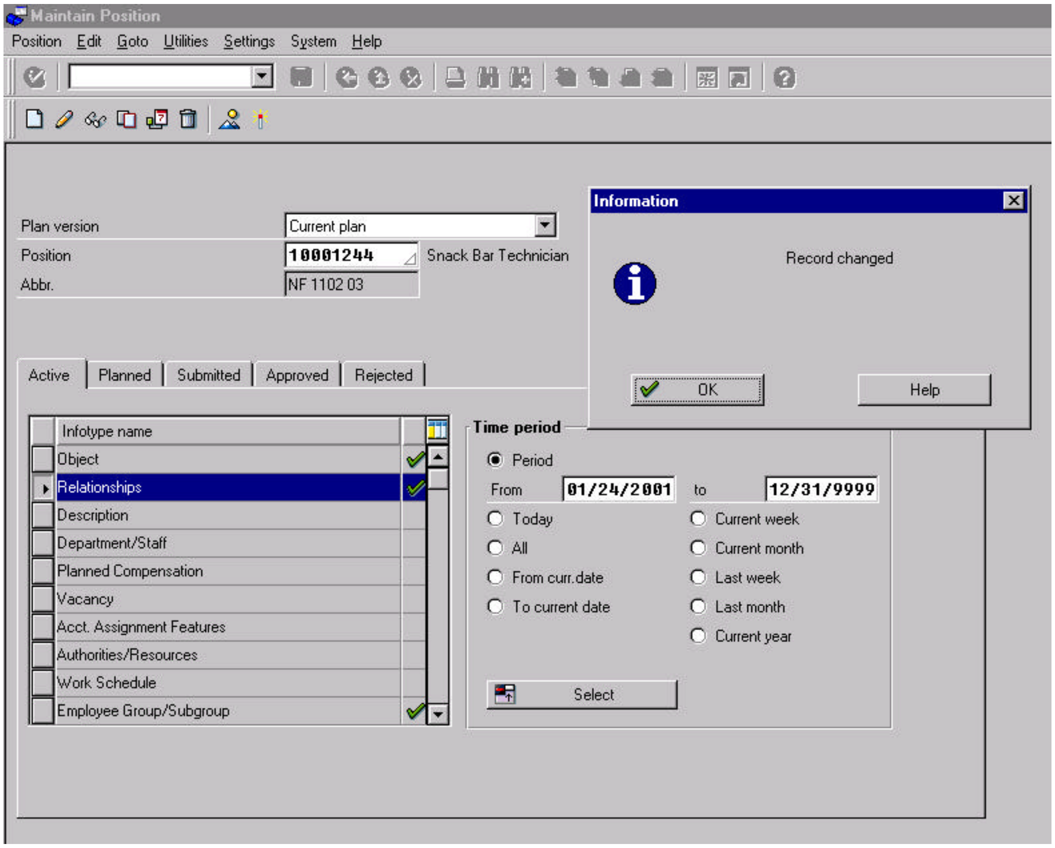


Once you arrive at the correct screen showing the Type of Related object to be "Job", enter the following information.

Field Name	Description	R/O/C	User Action/Values
Type of related object	Should always stay at "Job"	R	User should not change this field
ID of Related object	The **new** object of the job	R	Enter the object ID of the new job. Use the search help dropdown arrow to help with the selection
Abbreviation	Job Abbreviation	C	This is a display field and will default from the Job ID
Name	Job Name	C	This is a display field and will default from the Job ID

Once all the information has been entered, click Enter to validate your entries. After the changes have been made, the screen will look similar to the following. The ID of related object, Abbreviation and Name have all been changed.

If all the entries are valid, click the Save icon. .



The record has been changed and the new relationship established.

Click the back arrow  to take you to the opening screen.